

# Unicenter<sup>®</sup> Service Desk

## ITIL User Guide

r11.2



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# Chapter 1: Introduction

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Welcome to Unicenter Service Desk, the most advanced tool for delivering superior user support services in heterogeneous UNIX and Windows computing environments. This product is a comprehensive, integrated solution for the total automation and management of both external (customer support) and internal (enterprise service center management) service desks.

## Audience

This guide is intended for anyone who will use Unicenter Service Desk as an analyst or administrator. The purpose of this guide is to help analysts and administrators start using Unicenter Service Desk in accordance with the applicable aspects of the Information Technology Infrastructure Library (ITIL) best practice processes for Service Support and Service Delivery. This guide will benefit anyone who wants to understand how Unicenter Service Desk solves the challenge of automating and managing service support, including Incident Management, Problem Management, Change Management, Configuration Management, and Service Level Management.

## What You Need to Know

To follow the instructions in this guide, you need a working knowledge of the operating system and Windows environment for your installation. This guide assumes you or someone in your organization has already gone through the necessary steps to install and configure the product, according to the information in the Implementation Guide.





# Chapter 2: Overview of Information Technology Infrastructure Library (ITIL)

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This chapter provides an overview of ITIL and its components.

## ITIL Service Support

The following sections discuss the components of ITIL's Service Support: Incident Management, Problem Management, Change Management, and Configuration Management. Only the components specifically addressed by Unicenter Service Desk are covered.

### Incident Management

The main responsibilities of Incident Management are:

- Incident detection and recording
- Classification of incidents and initial support
- Resolution and recovery
- Incident closure
- Incident ownership and tracking

Unicenter Service Desk supports these processes, enabling incidents to be recorded, classified, escalated, and tracked. To assist with resolution, it provides integrated access to knowledge based tools and known errors, and permits integrated access to diagnostic tools, such as Unicenter Asset Management, Unicenter Remote Control, Unicenter Network and Systems Management, as well as Unicenter Asset Portfolio Management for contracts and licenses for accurate service information or financial details.

## Problem Management

The main responsibilities of Problem Management are:

- Problem identification and recording
- Problem classification
- Problem investigation and diagnosis
- Proactive prevention of problems using techniques, such as trend analysis
- Problem reviews
- Management reports on problem causes

Unicenter Service Desk provides the means to record and classify problems. It provides the integrated hand over of incidents to the problem management process. It also provides the facilities to enable the tracking and escalating of problems through to resolution, and generating known errors when the resolution is identified. It permits integrated access to diagnostic tools, such as Unicenter Asset Management, Unicenter Remote Control, Unicenter Network and Systems Management, as well as Unicenter Asset Portfolio Management for contracts and licenses for accurate service information or financial details. It also provides the management reporting required.

## Change Management

The main responsibilities of Change Management are:

- Raising and recording change requests
- Assessing the impact, cost, benefit and risk of a change
- Obtaining proper approval for changes
- Managing the implementation of the change
- Monitoring and reporting on the implementation
- Reviewing and closing change requests

Unicenter Service Desk provides the means to record and track change requests. These can be entered directly or flow from incidents or problems. Unicenter Service Desk also supports the approvals process, enabling the change procedures to be tracked and accounted.

## Configuration Management

The main responsibilities of Configuration Management are:

- Identify all relevant configuration items
- Maintain control over the configuration items
- Account for the status of the configuration items
- Provide audit information on the configuration items
- Enable planning

Unicenter Service Desk contains information about the configuration items being managed in its repository, allowing them to be used in the other ITIL processes. It permits integrated access to diagnostic tools, such as Unicenter Asset Management, Unicenter Remote Control, Unicenter Network and Systems Management, as well as Unicenter Asset Portfolio Management for contracts and licenses for accurate service information or financial details. It also provides the management reporting required.

## ITIL Service Delivery

The following section discusses the Service Level Management component of ITIL's Service Delivery. Only the component specifically addressed by Unicenter Service Desk is covered.

## Service Level Management

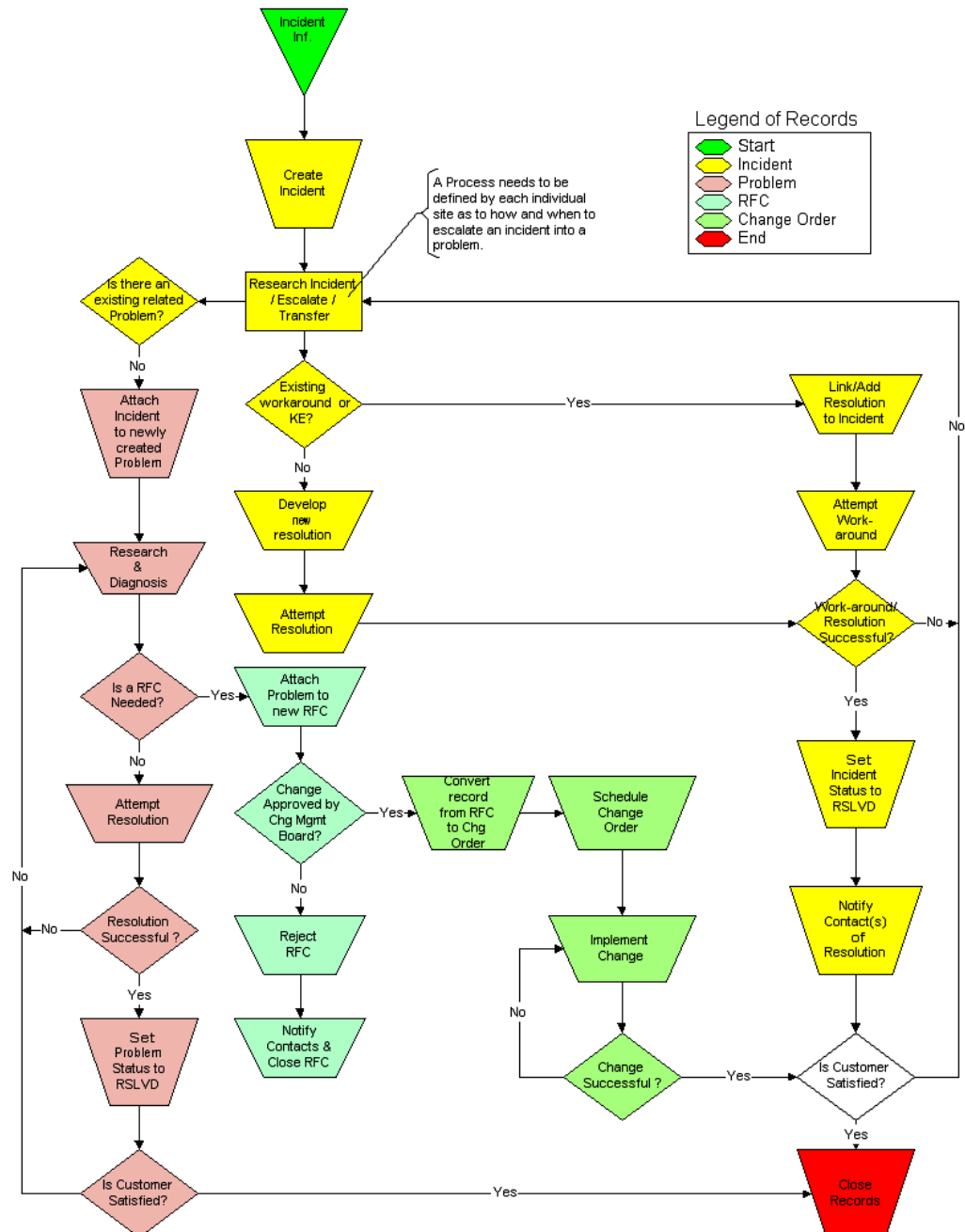
The main responsibilities of Service Level Management are:

- Negotiating and agreeing upon service deliverable targets
- Measuring and reporting on the service levels achieved, resources required, and cost
- Continuously improving service levels
- Coordinating other Service Management functions
- Reviewing SLAs to meet changing business needs

Unicenter Service Desk enables the recording of negotiated SLAs for the delivery of service by the service desk organization to its customers. It allows for reporting on progress against the SLA, while proactive warnings can be generated when there is a risk of not achieving the SLA. This is performed through the use of the new built-in Service Entitlement, as well as the Time to Violation processing. In general, Service Entitlement enhances Unicenter Service Desk's SLA functionality by helping large call centers define the service levels for their multiple organizations. It allows for every organization to be assigned to a single contract and every contract to be assigned an organization, thereby centralizing the management of Service Types. In addition, an association can be mapped to specific service types. The Time to Violation flag (fired by events) triggers if the status of a ticket does not change, which is updated with every update.

## Sample ITIL Process Flow Diagram

The following diagram shows a sample flow that can be used in Unicenter Service Desk to support ITIL processes.





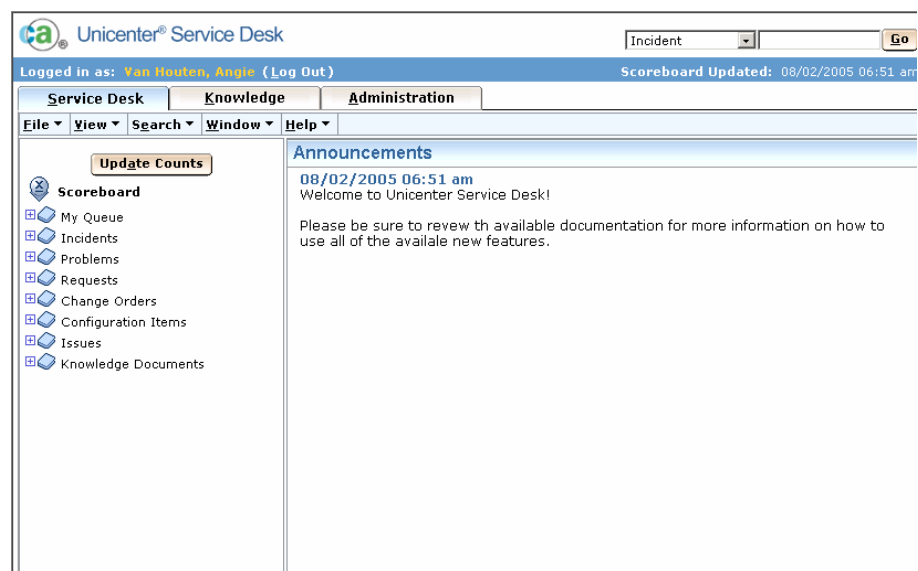
# Chapter 3: Incident Management

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To support the Incident Management processes of ITIL, Unicenter Service Desk was modified to use ITIL-specific terminology and processes. This chapter provides a brief overview of the functionality provided in Unicenter Service Desk, r11.

## Main Page

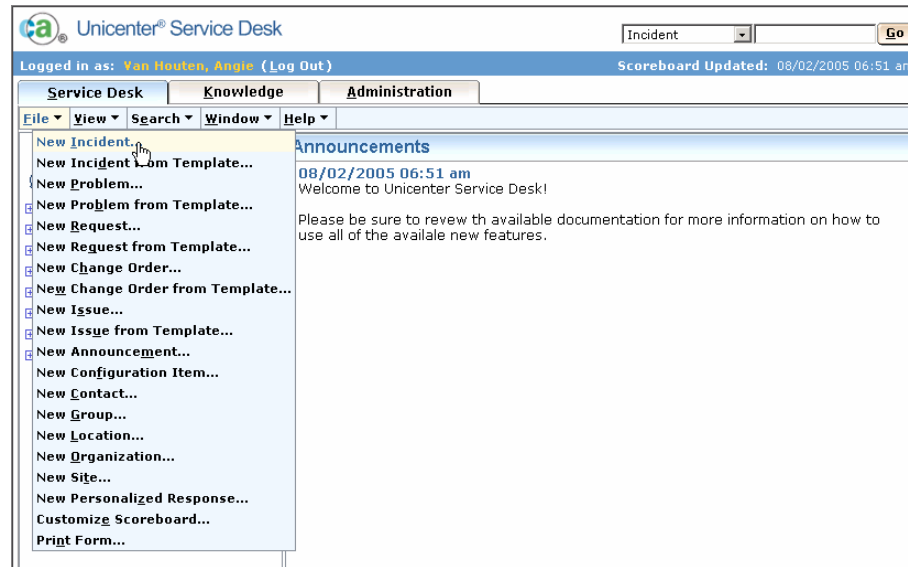
Once logged in to the web interface of Unicenter Service Desk, the following form appears:



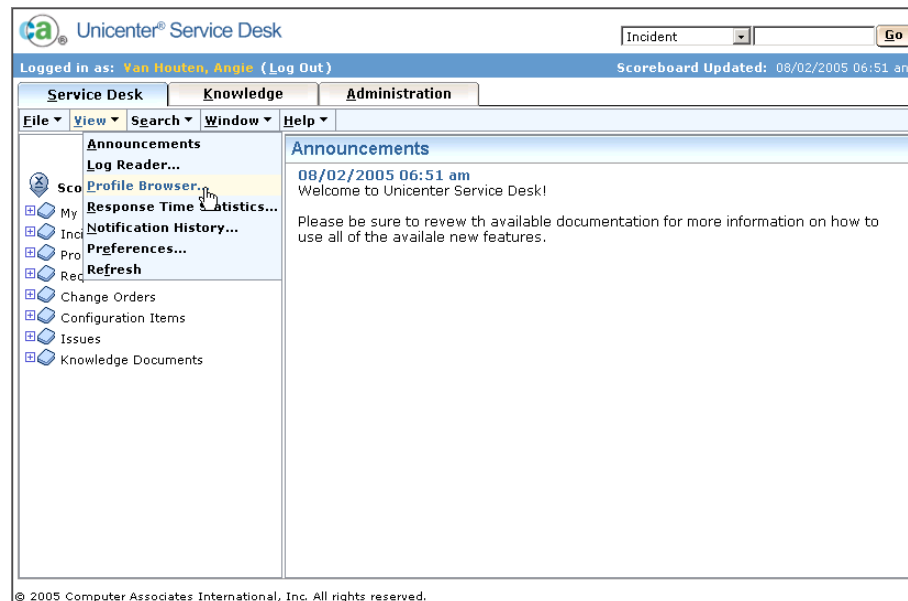
At this point, you are able to view all available announcements. Additionally, by going to the top right corner of the page, you can enter an Incident number assigned to any existing Incident and by clicking Go, navigate directly to your selected Incident's Detail window. Also included on the main page is the Scoreboard, where default nodes have been subdivided into folders that can assist all users in quickly identifying elements of interest.

## Work with Incidents

To create new incidents, you must select the File menu and choose New Incident or New Incident from Template, as shown in the following example:



Another option available for your use is Profile Browser, which you can access from the View menu, as shown in the following example:





By selecting Profile Browser, the following Contact Information for Heldman, John Q appears which provides you with a launch point for creating new Incidents after first viewing your customer's details. Any information previously entered into the Scratchpad field automatically transfers to the Incident's description field.

The screenshot displays the Unicenter Service Desk interface. At the top, it shows the user is logged in as 'Van Houten, Angie' with a 'Log Out' link. A search bar contains the word 'Incident' and a 'Go' button. Below this is a menu bar with 'File', 'View', 'Search', 'Window', and 'Help'. The main content area is divided into two sections. The left section, titled 'Contact', shows a list of tabs for 'Heldman, John Q': '1. Information', '2. Environment', '3. Issue History', '4. Incident History', '5. Problem History', '6. Request History', and '7. Change Order History'. Below these tabs are buttons for 'Edit This Contact', 'Recent Activity', 'Select New Contact', and 'Copy to Edit Form'. The right section, titled 'Contact Information for Heldman, John Q', contains a form with the following fields: 'Last Name' (Heldman), 'First Name' (John), 'Middle Name' (Q), and 'Status' (Active). Below these are sections for 'System Login' (jheldman), 'Contact Type' (Customer), 'Access Type' (Customer), 'Service Type' (Central Time), 'Data Partition' (08/02/2005 07:06 am), 'Phone Number' (1-630-555-1212), 'Fax Number', 'Pager Number', 'Alt. Phone #', 'Email Address' (jheldman0001@cai.com), 'Location', 'Site', 'Address', and 'Contact Notes'. At the bottom of the interface is a 'Scratchpad' section with buttons for 'Spelling', 'Search Knowledge', 'Clear Scratchpad', and 'Quick Close Request'. The scratchpad contains a text area with the text 'Caller is having a problem with his printer', a 'Quick Incident' button, a 'Type' dropdown menu set to 'Incident', a 'Template' link, and a 'New' button.

Last Name	First Name	Middle Name	Status
Heldman	John	Q	Active

System Login	Contact Type	Access Type
jheldman	Customer	Customer

Service Type	Data Partition	Time Zone	Local Time
Central Time	08/02/2005 07:06 am		

Phone Number	Fax Number	Pager Number	Alt. Phone #
1-630-555-1212			

Email Address	Location	Site
jheldman0001@cai.com		

Address	Contact Notes

Scratchpad

Caller is having a problem with his printer

Quick Incident

Type: Incident

Template

New

The next example shows the Incident Detail form and the options available on the Activities menu. These options provide easy handling of activities that are regularly conducted during the life of an Incident. For example, you can select Update Status to set a new status for the Incident, such as Closed from Open. This functionality also provides you with the opportunity to enter descriptive information as to why the Incident is being set to this new status.

Unicenter® Service Desk

Logged in as: Van Houten, Angie (Log Out)

File View Activities Actions Search Reports Window Help

26 Incident De

Update Status...  
 Callback...  
 Research...  
 Heldm...  
 Log Comment...  
 Solution...  
 Transfer...  
 Report...  
 Escalate...  
 Van Ho...  
 Manual Notify...  
 Severi...  
 Attach to Existing Change Order...

Edit Create Change Order Profile Browser Create Problem

Incident Area Status Open Priority None

Incidentee Group Configuration Item

Van Houten, Angie

Impact 4 Active? YES

Change Problem Call Back Date/Time Root Cause

Summary Information

Summary Total Activity Time  
 Caller is having a problem with his printer 00:00:25

Description Incident Priority  
 Caller is having a problem with his printer 6

Open Date/Time Last Modified Resolve Date/Time Close Date/Time  
 08/02/2005 07:06 am 08/02/2005 07:09 am

6. Knowledge 7. Solutions 8. Properties

1. Activities 2. Event Log 3. Attachments 4. Service Type 5. Parent / Child

Incident Activity Log List Search Show Filter Clear Filter

Created By / Description	On	Time Spent	Type
Van Houten, Angie	08/02/2005 07:09 am	00:00:00	Field Update
FIELD='Impact' OLD='None' NEW='4' FIELD='urgency' OLD='1' NEW='2'			
Van Houten, Angie	08/02/2005 07:09 am	00:00:21	Field Update
FIELD='incident_priority' OLD='0' NEW='6'			
Van Houten, Angie	08/02/2005 07:06 am	00:00:25	Initial
create a new request/incident/problem/change/issue			

By using the Incident Area field on the Incident Detail form, you can categorize the Incident for ease of reporting, as well as provide automated assignment and escalation functionality. For a full description of these elements, see Request Area Setup and Automatic Assignment in the chapter “Establish the Support Structure” of the *Unicenter Service Desk Administrator Guide*.

On the Incident Detail form, the two key fields that are specific to the ITIL configuration are: Incident Priority and Problem. For example, the Incident Priority field illustrated by the following example reflects a sum of 6:

Unicenter® Service Desk

Logged in as: Van Houten, Angie (Log Out)

Incident (Close Window)

File View Activities Actions Search Reports Window Help

26 Incident Detail Edit Create Change Order Profile Browser Create Problem

Affected End User	Incident Area	Status	Priority
Heldman, John O		Open	None

Detail

Reported By	Assignee	Group	Configuration Item
Van Houten, Angie	Van Houten, Angie		
Severity	Urgency	Impact	Active?
2	4		YES
Change	Problem	Call Back Date/Time	Root Cause

Summary Information

Summary	Total Activity Time
Caller is having a problem with his printer	00:00:46
Description	Incident Priority
Caller is having a problem with his printer	6
Open Date/Time	Last Modified
08/02/2005 07:06 am	08/02/2005 07:09 am
Resolve Date/Time	Close Date/Time

6. Knowledge	7. Solutions	8. Properties
1. Activities	2. Event Log	3. Attachments
4. Service Type	5. Parent / Child	

Incident Activity Log List Search Show Filter Clear Filter

Created By / Description	On	Time Spent	Type
Van Houten, Angie	08/02/2005 07:09 am	00:00:00	Field Update
FIELD='Impact' OLD='None' NEW='4' FIELD='urgency' OLD='1' NEW='2'			
Van Houten, Angie	08/02/2005 07:09 am	00:00:21	Field Update
FIELD='incident_priority' OLD='0' NEW='6'			
Van Houten, Angie	08/02/2005 07:06 am	00:00:25	Initial
create a new request/incident/problem/change/issue			

1-3 of 3

The Incident Priority field is calculated by taking the sum of two integer fields (called Value) that have been added to the Impact and Urgency tables. The Value field displays on the following Impact Detail and Urgency Detail forms, which are accessed from the Administration tab:

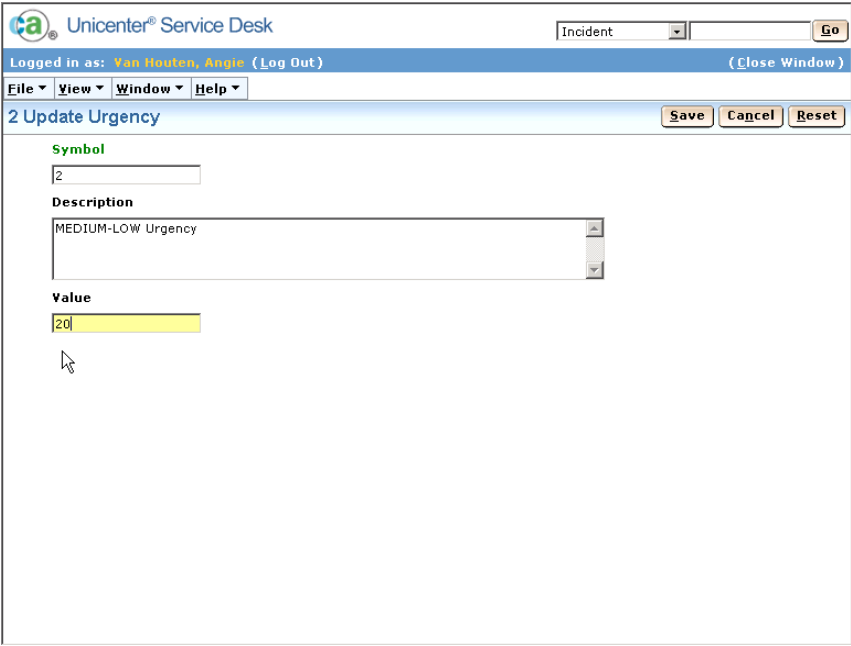
The screenshot shows the '4 Impact Detail' form in the Unicenter Service Desk interface. The header includes the Unicenter logo, the text 'Unicenter® Service Desk', a search bar with 'Incident' and a 'Go' button, and a login status 'Logged in as: Van Houten, Angie (Log Out)' with a '(Close Window)' link. Below the header is a menu bar with 'File', 'View', 'Window', and 'Help'. The main content area is titled '4 Impact Detail' and contains three fields: 'Symbol' with the value '4', 'Description' with the value 'MEDIUM-LOW Impact', and 'Value' with the value '4'. An 'Edit' button is located in the top right corner of the form.

The screenshot shows the '2 Urgency Detail' form in the Unicenter Service Desk interface. The header is identical to the previous screenshot, showing the Unicenter logo, 'Unicenter® Service Desk', a search bar with 'Incident' and a 'Go' button, and a login status 'Logged in as: Van Houten, Angie (Log Out)' with a '(Close Window)' link. Below the header is a menu bar with 'File', 'View', 'Window', and 'Help'. The main content area is titled '2 Urgency Detail' and contains three fields: 'Symbol' with the value '2', 'Description' with the value 'MEDIUM-LOW Urgency', and 'Value' with the value '2'. An 'Edit' button is located in the top right corner of the form.

Using the default values, the Incident Priority value can fall within the following range:

- 0 (where Urgency = none and Impact = none)
- to
- 10 (where Urgency = 5 and Impact = 5)

However, the administrator can change the *values* to implement a different Incident Priority scheme. Using the previous Impact and Urgency Detail forms as examples, suppose the administrator changes the Urgency from 2 to a value of 20, and the Impact from 4 to a value of 40:



The screenshot shows the '2 Update Urgency' form in the Unicenter Service Desk application. The form is titled '2 Update Urgency' and has buttons for 'Save', 'Cancel', and 'Reset'. It contains three fields: 'Symbol' with the value '2', 'Description' with the text 'MEDIUM-LOW Urgency', and 'Value' with the value '20'. The 'Value' field is highlighted in yellow. The form is part of a larger application window with a menu bar (File, View, Window, Help) and a status bar (Logged in as: Van Houten, Angie (Log Out)).

Unicenter® Service Desk

Incident [ ] Go

Logged in as: Van Houten, Angie (Log Out) (Close Window)

File View Window Help

4 Update Impact Save Cancel Reset

Symbol  
4

Description  
MEDIUM-LOW Impact

Value  
40

This would result in an Incident Priority of 60 for *new* Incidents, even though Urgency 2 and Impact of 4 currently appear on the Incident Detail form:

Unicenter® Service Desk

Incident [ ] Go

Logged in as: Van Houten, Angie (Log Out) (Close Window)

File View Activities Actions Search Reports Window Help

28 Incident Detail Edit Create Change Order Profile Browser Create Problem

Affected End User	Incident Area	Status	Priority
Heldman, John Q		Open	None

Detail

Reported By	Assignee	Group	Configuration Item
Van Houten, Angie	Van Houten, Angie		
Severity	Urgency	Impact	Active?
	2	4	YES
Change	Problem	Call Back Date/Time	Root Cause

Summary Information

Summary	Total Activity Time		
	00:00:16		
Description	Incident Priority		
	60		
Open Date/Time	Last Modified	Resolve Date/Time	Close Date/Time
08/02/2005 07:16 am	08/02/2005 07:16 am		

6. Knowledge 7. Solutions 8. Properties

1. Activities 2. Event Log 3. Attachments 4. Service Type 5. Parent / Child

Incident Activity Log List Search Show Filter Clear Filter

Created By / Description	On	Time Spent	Type
Van Houten, Angie	08/02/2005 07:16 am	00:00:16	Initial
create a new request/incident/problem/change/issue			

1 incident activity log found

1 incident activity log found

Existing Incidents remain unaffected until either the Urgency or Impact value is changed, but if either value is changed, the Incident Priority is recomputed when the ticket is *saved*.

**Note:** The Incident Priority field is separate from the Priority field and cannot be manually set. The Problem field can be manually set from the Incident Detail form (while in edit mode), as well as from the Problem Detail form.

Additionally, a Create Problem button (top, right of the form) has been added to Incident Detail for the ITIL configuration. This button lets you create a new Problem containing information from the following fields in the originating Incident:

- Affected End User
- Assignee
- Group
- Priority
- Severity
- Urgency
- Impact
- Change
- Configuration Item
- Summary
- Description

## Incident Search Page

To assist in locating Incidents, the Scoreboard and the Incident Search form are very useful tools. The Scoreboard provides the following default nodes that should be useful in supporting the Incident Management processes.

Following are the default nodes under “My Queue”:

### **My Incidents**

This node displays all active Incidents that have been assigned to the logged in user.

### **Today's Inc Callbacks**

This node displays all active Incidents that are assigned to the logged in user and have the call back flag set to call back today or earlier.

Following are the default nodes under “Incidents” > “Assigned”:

### **All**

This node displays all assigned Incidents, regardless of priority.

### **High Priority**

This node displays all priority 1 Incidents that have an assignee or an assigned group.

### **Medium Priority**

This node displays all priority 2 or priority 3 Incidents that have an assignee or an assigned group.

### **Low Priority**

This node displays all priority 4, priority 5, or priority None Incidents that have an assignee or an assigned group.

Following are the default nodes under “Incidents” > “Unassigned”:

### **All**

This node displays all unassigned Incidents, regardless of priority.

### **High Priority**

This node displays all priority 1 Incidents that do not have an assignee or an assigned group.

### **Medium Priority**

This node displays all priority 2 or priority 3 Incidents that do not have an assignee or an assigned group.

### **Low Priority**

This node displays all priority 4, priority 5, or priority None Incidents that do not have an assignee or an assigned group.



The Incident Search form is available by selecting Incidents from the Search menu located on the menu bar. As you can see from the following example, the Incident Search form provides you with several options for editing an incident, specifically, the Edit in List button, as well as many fields for performing a granular search. The selection of available fields can be expanded by clicking on the green filter icons located on the right side of the Incident Search form.

## Reports

Both the Incident Detail form and the Incident Search form provide the means for you to retrieve a detail or summary report by selecting Summary or Detail from the Reports menu. If your selection is from the Incident Search form, information for all displayed incidents is provided in the reports.

When Unicenter Service Desk is configured to use the ITIL methodology, you can also easily retrieve reports for Incidents and Problems. Both Incidents and Problems are held in the Call\_Req table along with Requests. The **Type** column distinguishes the record as follows:

- R = Request
- I = Incident
- P = Problem

You can modify existing out-of-the-box reports by adding the type field and the appropriate value to the where clause of the SQL query.

**Note:** If the Incident is attached to a Problem, a pointer to the Problem is stored in the problem field of the Incident. Also for Incidents, the Incident Priority value is stored in the incident\_priority field.



# Chapter 4: Request Management

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Request Management is part of the base Unicenter Service Desk functionality and can be used as part of a cohesive solution for delivering the standard customer support processes. This integrated functionality can be used in concert with both ITIL Incident Management and Problem Management as dictated by the processes used in your organization.

## Functionality

In general, this functionality can be used to support Requests directed to Support or questions from customers in your organization. Therefore, the differentiation between Service Requests and Incidents are defined as follows:

### **Service Requests**

These could be described as a request from a user for support, information, or assistance and does not represent a failure in the IT infrastructure.

### **Incidents**

These could be described as any event that causes a reduction in the quality of the service of your IT infrastructure.

Depending on the style and structure of your support organization, having this extra ability to categorize activity at the service desk can be quite valuable.

Additionally, because of the way this functionality is delivered, certain advantages are available. Because Incidents, Problems, and Requests are all stored in the same table, you can easily report on all Problems, Incidents, and Requests by a specific customer, end-user, or their organization.

The following example represents this Request Search form:

The screenshot displays the Unicenter Service Desk interface. At the top, it shows the user is logged in as 'Van Houten, Angie' with a 'Log Out' link. The 'Scoreboard Updated' timestamp is '08/02/2005 06:51 am'. The main navigation bar includes 'Service Desk', 'Knowledge', and 'Administration'. Below this is a menu bar with 'File', 'View', 'Search', 'Window', and 'Help'. The left sidebar features an 'Update Counts' button and a 'Scoreboard' section with links to 'My Queue', 'Incidents', 'Problems', 'Requests', 'Change Orders', 'Configuration Items', 'Issues', and 'Knowledge Documents'. The central 'Request Search' panel includes a search bar and several filter fields: 'Assignment Status' (set to '<empty>'), 'Priority' (set to '<empty>'), 'Active' (set to 'Active'), 'Request Area', 'Configuration Item', 'Reported By', 'End User Name', 'End User Userid', 'End User Location', and 'End User Organization'. Action buttons 'Search', 'Hide Filter', 'Clear Filter', and 'Edit in List' are located at the top right of the search panel. A 'More...' link is at the bottom right. The footer contains the copyright notice: '© 2005 Computer Associates International, Inc. All rights reserved.'

By default, the employee interface permits users to create Requests instead of Incidents. If you decide to use Incidents exclusively, you can change this behavior by simply creating a Data Partition with a Defaults Constraint that always creates Incidents instead of Requests, and then assigning this Data Partition to your end-users.

Use the following **Create New Data Partition Constraint** form to create the new Data Partition with a Default Constraint:

The screenshot shows the 'Create New Data Partition Constraint' form in the Unicenter Service Desk application. The form is titled 'Create New Data Partition Constraint' and includes a 'Save' button, a 'Cancel' button, and a 'Reset' button. The form is divided into two main sections: '1. Constraint' and '2. SQL Translation'. In the '1. Constraint' section, there are four fields: 'Data Partition Name' (containing 'Employee'), 'Table Name' (containing 'Call\_Req'), 'Constraint Type' (a dropdown menu set to 'Defaults'), and 'Record Status' (a dropdown menu set to 'Active'). Below these fields is a 'Constraint' section with a text area containing 'type='I''. The '2. SQL Translation' section is currently empty. At the bottom of the form, there is an 'Error Message' field.

**Note:** For more information on the steps required, see Establish Data Partitions in the chapter “Policy Implementation” of the *Unicenter Service Desk Administrator Guide*.

The following example of the Data Partition Constraint Detail form displays a specific Data Constraint (with type = 'I').

**Note:** When using the Data Constraint type=I, be sure to capitalize the I because it is case-sensitive.

In this example, a sample Data Partition named Employee has already been created.

Unicenter® Service Desk

Incident

Logged in as: Van Houten, Angie (Log Out)

File View Window Help

Data Partition Constraint Detail

Data Partition Name	Table Name	Constraint Type	Record Status
Employee	Call_Req	Defaults	Active

1. Constraint

2. SQL Translation

Constraint

Constraint

type='I'

Error Message

At this point, the administrator needs to customize the terminology on the Employee Web Interface so that the term Incident displays instead of the term Request. Otherwise, the customer sees Request and refers to Requests, causing confusion for the analyst who sees them as Incidents. An administrator can use the following Personalized Response Detail form to customize certain fields for certain types of tickets; specifically, Incidents and Problems. This particular form is not exclusive to ITIL, but displays for certain types of tickets if designated to do so.

Unicenter® Service Desk

Incident [Go]

Logged in as: Van Houten, Angie (Log Out) (Close Window)

File View Search Window Help

Personalized Response Detail [Edit]

Name	Response Owner	Record Status
standard	Van Houten, Angie	Active

**Response**

If there are any questions, please don't hesitate to call the Help Desk at 630-555-1212.

**Display this Response for:**

Requests	Incidents	Problems	Change Orders	Issues
X	X	X	X	X



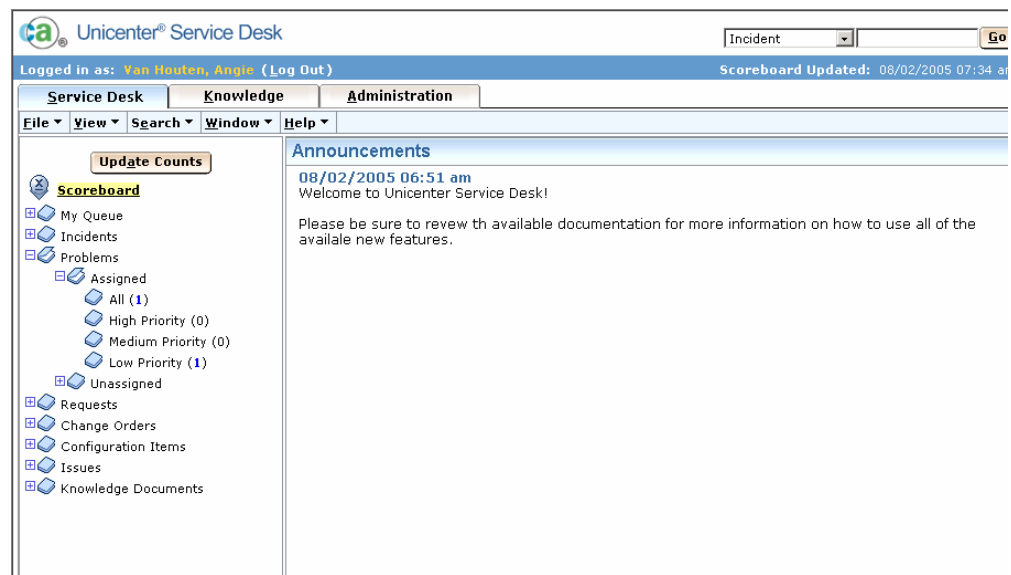


# Chapter 5: Problem Management

To support the Problem Management processes of ITIL, Unicenter Service Desk was modified to use ITIL specific terminology and processes. This chapter provides a brief overview of the functionality provided in Unicenter Service Desk, r11.

## Main Page

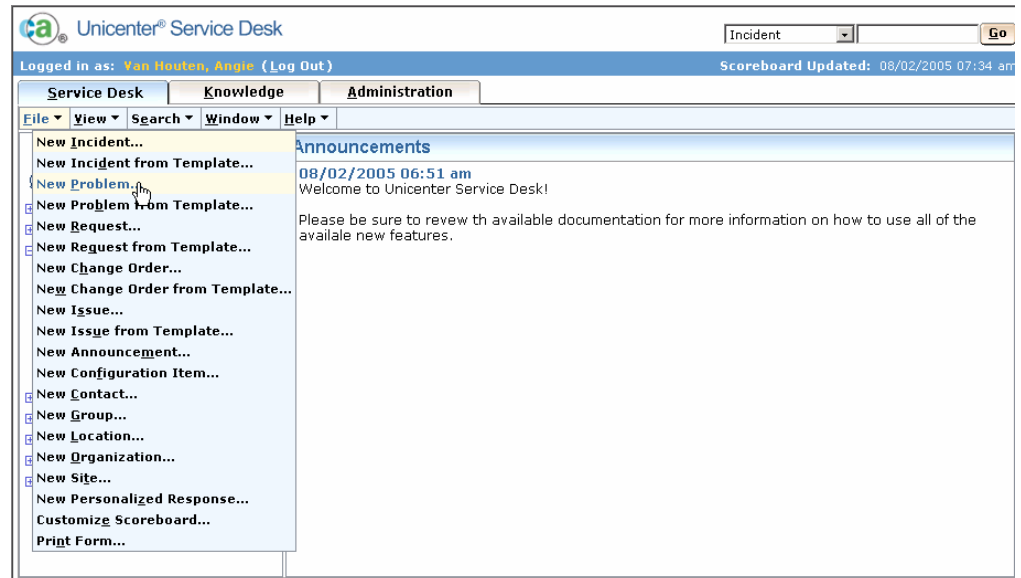
Once logged in to the web interface of Unicenter Service Desk, the following form appears. In this example, the Problems node has been selected to display the Assigned problems:



From this point, you are able to view all available announcements. Additionally, by going to the top right corner of the page, you can choose Problem from the drop-down menu, and then enter a number assigned to any existing Problem. By clicking Go, you can navigate directly to your selected Problem's Detail window. Also included on the main page is the Scoreboard, where default nodes have been subdivided into folders that can assist all users in quickly identifying elements of interest.

## Work with Problems

To begin working with problems, select the File menu and choose New Problem or New Problem from Template, as illustrated by the following example:



The next example shows the Problem Detail form and the options available on the Activities menu. These options provide easy handling of activities that are regularly conducted during the life of a Problem. For example, you can select Update Status to set a new status for the Problem, such as Closed from Open. This functionality also provides you with the opportunity to enter descriptive information as to why the Problem is being set to this new status.

Unicenter® Service Desk

Logged in as: Van Houten, Angie (Log Out)

Problem [ ] Go

(Close Window)

File View Activities Actions Search Reports Window Help

29 Problem D

Update Status...  
 Callback...  
 Research...  
 Log Comment...  
 Solution...  
 Transfer...  
 Report...  
 Escalate...  
 Van Houten, Angie Manual Notify...  
 Severi Attach to Existing Change Order...

Problem Area: Hardware Status: Open Priority: None

Assignee: Van Houten, Angie Group: Configuration Item

Impact: None Active?: YES

Change: Charge Back ID: Call Back Date/Time: Root Cause:

Summary Information

Summary: HP LaserJet III has a 10Mbps interface card Total Activity Time: 00:01:54

Description: HP LaserJet III has a 10Mbps interface card, but hub port is set to 100Mbps.

Open Date/Time: 08/02/2005 07:32 am Last Modified: 08/02/2005 07:34 am Resolve Date/Time: Close Date/Time:

6. Knowledge 7. Solutions 8. Parent / Child 9. Properties

1. Activities 2. Event Log 3. Attachments 4. Service Type 5. Attached Incidents

Problem Activity Log List

Search Show Filter Clear Filter

1 problem activity log found

Created By / Description	On	Time Spent	Type
Van Houten, Angie create a new request/incident/problem/change/issue	08/02/2005 07:32 am	00:01:54	Initial

1 problem activity log found

By using the Problem Area field on the Problem Detail form, you can categorize the Problem for ease of reporting, as well as provide automated assignment and escalation functionality. For a full description of these elements, see Request Area Setup and Automatic Assignment in the chapter “Establish the Support Structure” of the *Unicenter Service Desk Administrator Guide*.

On the Problem Detail form, the key element that is specific to the ITIL configuration is the Attached Incidents tab located in the lower portion of the form. From this notebook tab, you can attach and remove Incidents. Simply click Attach/Remove Incidents and follow the prompts to accomplish these steps.

The following Request/Incident/Problem Area Detail form contains values that can be customized so that certain fields display for certain types of tickets (Requests, Incidents, and Problems). It contains check boxes that control when the form is presented to the user. The administrator sets these values by accessing the Administration tab. Results display on the following example form:

Unicenter® Service Desk

Incident

Logged in as: Van Houten, Angie (Log Out) (Close Window)

File View Search Window Help

Request/Incident/Problem Area Detail

Symbol	Organization	Record Status
Hardware		Active
Group	Assignee	Service Type
Survey	Service Contract	

Description

Hardware

This category is valid for the following:

Requests	Incidents	Problems
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

1. Properties 2. Auto Assignment

Property List

Sequence	Label	Code
No Properties Attached		

Another form that contains values that can be customized so that certain fields display for certain types of tickets is the following Request/Incident/Problem Status Detail form. It now offers a new status called Known Error (which displays in the Symbol field), that applies to Problems only. This new status is one of the methods available for implementing the known errors part of ITIL Problem Management.

Unicenter® Service Desk

Incident

Logged in as: Van Houten, Angie (Log Out) (Close Window)

File View Window Help

Request/Incident/Problem Status Detail

Symbol	Record Status	Code
Known Error	Active	KE
Make Active?	Stop Service Type Events?	Make Resolved?
Yes	No	No
Description		
Known Error		
Last Modified Date	Last Modified By	
Status valid for		
Requests	Incidents	Problems
No	No	Yes

**Note:** Another method available for implementing known errors of ITIL Problem Management is to use Unicenter Knowledge Tools.

Finally, the following Personalized Response Detail form can be customized by the administrator so that certain fields display for certain types of tickets; specifically, Incidents and Problems. As previously mentioned, this particular form is not exclusive to ITIL, but displays for certain types of tickets if designated to do so.

Unicenter® Service Desk

Incident

Logged in as: Van Houten, Angie (Log Out) (Close Window)

File View Search Window Help

**Personalized Response Detail**

Name	Response Owner	Record Status
standard	Van Houten, Angie	Active

**Response**

If there are any questions, please don't hesitate to call the Help Desk at 630-555-1212.

**Display this Response for:**

Requests	Incidents	Problems	Change Orders	Issues
X	X	X	X	X

## Problem Search Page

To assist in locating problems, the Scoreboard and the Problem Search form are very useful tools. The Scoreboard is provided with the following default nodes that should be useful in supporting the Problem Management processes.

Following are the default nodes under "My Queue":

### **My Problems**

This node displays all active problems that have been assigned to the logged in user.

### **Today's Prb Callbacks**

This node displays all active problems that are assigned to the logged in user and have the call back flag to call back today or earlier.

Following are the default nodes under "Problems" > "Assigned":

### **All**

This node displays all assigned Problems, regardless of priority.

### **High Priority**

This node displays all priority 1 problems that have an assignee or an assigned group.

### **Medium Priority**

This node displays all priority 2 or priority 3 problems that have an assignee or an assigned group.

### **Low Priority**

This node displays all priority 4, priority 5, or priority None problems that have an assignee or an assigned group.

Following are the default nodes under "Problems" > "Unassigned":

### **All**

This node displays all unassigned Problems, regardless of priority.

### **High Priority**

This node displays all priority 1 problems that do not have an assignee or an assigned group.

### **Medium Priority**

This node displays all priority 2 or priority 3 problems that do not have an assignee or an assigned group.

### **Low Priority**

This node displays all priority 4, priority 5, or priority None problems that do not have an assignee or an assigned group.

The Problem Search form is available by selecting Problems from the Search menu located on the menu bar. As you can see from the following example, the Problem Search form provides you with many fields for performing a granular search. The selection of available fields can be expanded by clicking on the green filter icons located on the right side of the Search form.

## Reports

Both the Problem Detail form and the Problem Search form provide the means for you to retrieve a detail or summary report by selecting Summary or Detail from the Reports menu. If your selection is from the Problem Search form, information for all displayed problems is provided in the reports.

When Unicenter Service Desk is configured to use the ITIL methodology, you can also easily retrieve reports for Incidents and Problems. Both Incidents and Problems are held in the Call\_Req table along with Requests. The **Type** column distinguishes the record as follows:

- R = Request
- I = Incident
- P = Problem

You can modify existing out-of-the-box reports by adding the type field and the appropriate value to the where clause of the SQL query.

**Note:** If the Incident is attached to a Problem, a pointer to the Problem is stored in the problem field of the Incident. Also for Incidents, the Incident Priority value is stored in the incident\_priority field.



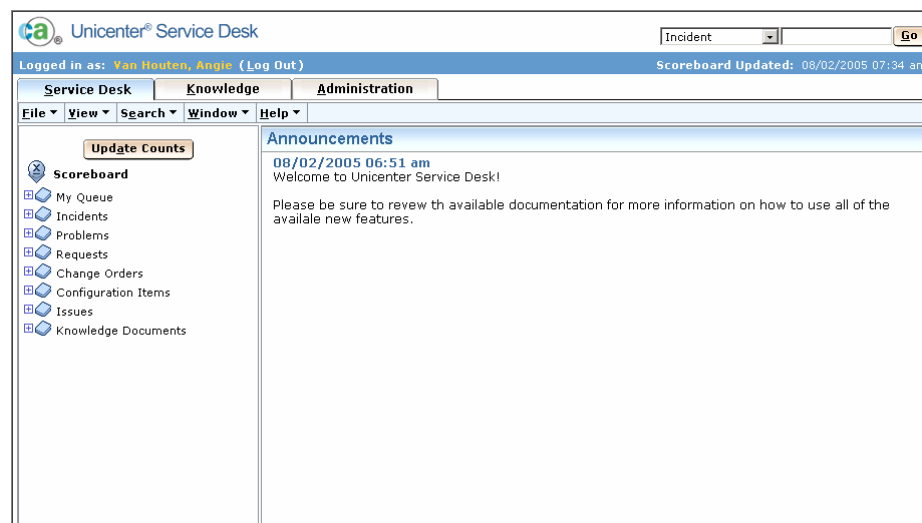
# Chapter 6: Change Management

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To support the Change Management processes of ITIL, Unicenter Service Desk was modified to use ITIL specific terminology and processes. This chapter provides a brief overview of the functionality provided in Unicenter Service Desk, r11.

## Main Page

Once logged in to the web interface of Unicenter Service Desk, the following form appears:

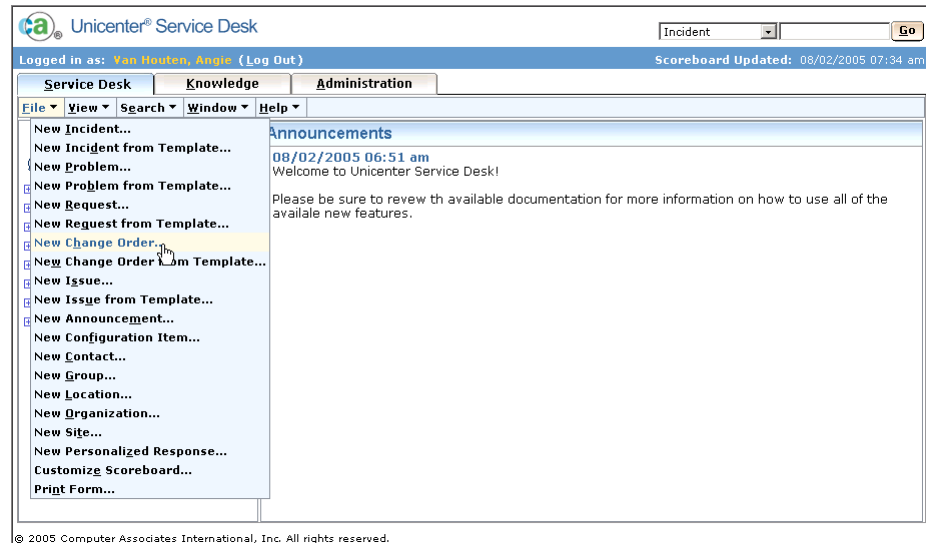


From this point you are able to view all available announcements. Additionally, by going to the top right corner of the page, you can choose Change from the drop-down menu, and then enter the number assigned to any existing Change. By clicking Go, you can navigate directly to your selected Change's Detail window.

Also included on the main page is the Scoreboard, where default nodes have been subdivided into folders that can assist all users in quickly identifying elements of interest.

## Work with Change Orders

To create new change orders, you must select the File menu and choose New Change Order or New Change Order from Template, as illustrated by the following example:



The next example shows the Change Detail form and the options available on the Activities menu. These options provide easy handling of activities that are regularly conducted during the life of a Change. For example, you can select Update Status to set a new status for the Change, such as Closed from Open. This functionality also provides you with the opportunity to enter descriptive information as to why the Change is being set to this new status.

Unicenter® Service Desk

Logged in as: Van Houten, Angie (Log Out)

File View Activities Actions Search Reports Window Help

21 Change De

Update Status  
Call Back...  
Research...  
Log Comment...  
Transfer...  
Escalate...  
Create  
Manual Notify...

Affected End User: Heldman, John Q  
Category: Add.IT.Other  
Status: RFC  
Priority: None

Assignee: Van Houten, Angie  
Group:   
Impact:   
Active?: YES

Need By Date:   
Call Back Date/Time:   
Root Cause:   
Organization:

Summary Information

Order Summary  
Need to replace printer interface card

Order Description

Open Date: 08/02/2005 07:45 am  
Actual Start Date:   
Resolve Date:   
Close Date:

1. Properties	2. Workflow Tasks	3. Config. Items	4. Activities	5. Related Orders
6. Service Type	7. Incidents / Problems	8. Event Log	9. Costs / Plans	10. Attachments

Related Requests List

Ref #	Type	Affected CI	Status	Summary
29	Problem		Open	HP LaserJet III has a 10Mbps interface card
26	Incident		Open	Caller is having a problem with his printer

By using the Category field on the Change Detail form, you can categorize the Change for ease of reporting, as well as provide automated assignment and escalation functionality. For a full description of these elements, see Request Area Setup and Automatic Assignment in the chapter "Establish the Support Structure" of the *Unicenter Service Desk Administrator Guide*.

To support the RFC functionality of ITIL, a status of RFC (Request For Change) has been added to the default list of statuses provided with Unicenter Service Desk. RFC is the default for new Change Orders, which is set in \$NX\_ROOT\bopcfg\majic\itil.mod.

On the Change Detail form, the key element that is specific to the ITIL configuration is the Incidents/Problems tab. From this notebook tab, you can attach Incidents, Problems, and Requests. Simply click the appropriate button to Attach Incidents, Attach Problems, or Attach Requests, and follow the prompts to accomplish these steps. Once attached, you can remove an Incident, Problem, or Request by opening the item and removing it from there.

## Change Order Search Page

To assist in locating changes, the Scoreboard and the Change Order Search form are very useful tools. The Scoreboard is provided with the following default nodes that should be useful in supporting the Change Management processes.

Following are the default nodes under "My Queue":

### **My Change Orders**

This node displays all active changes that have been assigned to the logged in user.

### **Today's CO Callbacks**

This node displays all active changes that are assigned to the logged in user and have the call back flag set to today or earlier.

Following are the default nodes under "Change Orders" > "Assigned":

### **All**

This node displays all changes that have an assignee or an assigned group.

### **Priority 1**

This node displays all priority 1 changes that have an assignee or an assigned group.

### **Priority 2**

This node displays all priority 2 changes that have an assignee or an assigned group.

### **Priority 3**

This node displays all priority 3 changes that have an assignee or an assigned group.

### **Priority 4**

This node displays all priority 4 changes that have an assignee or an assigned group.

### **Priority 5**

This node displays all priority 5 changes that have an assignee or an assigned group.

### **Priority None**

This node displays all priority None changes that have an assignee or an assigned group.

Following are the default nodes under "Change Orders" > "Unassigned":

**All**

This node displays all changes that do not have an assignee or an assigned group.

**Priority 1**

This node displays all priority 1 changes that do not have an assignee or an assigned group.

**Priority 2**

This node displays all priority 2 changes that do not have an assignee or an assigned group.

**Priority 3**

This node displays all priority 3 changes that do not have an assignee or an assigned group.

**Priority 4**

This node displays all priority 4 changes that do not have an assignee or an assigned group.

**Priority 5**

This node displays all priority 5 changes that do not have an assignee or an assigned group.

**Priority None**

This node displays all priority None changes that do not have an assignee or an assigned group.

The Change Order Search form is available by selecting Change Orders from the Search menu located on the menu bar. As you can see from the following example, the Change Order Search form provides you with several options for editing the change, specifically, the Edit in List button, as well as many fields for performing a granular search. The selection of available fields can be expanded by clicking on the green filter icons located on the right side of the Search form.

The screenshot displays the Unicenter Service Desk interface. At the top, the header shows 'Unicenter Service Desk' and a 'Change' dropdown menu with a 'Go' button. Below the header, a navigation bar includes 'Service Desk', 'Knowledge', and 'Administration' tabs. A menu bar with 'File', 'View', 'Search', 'Window', and 'Help' is visible. On the left, a 'Scoreboard' sidebar lists various items like 'My Queue', 'Incidents', 'Problems', 'Requests', 'Change Orders', 'Configuration Items', 'Issues', and 'Knowledge Documents'. The main area is titled 'Change Order Search' and features a 'Search' button, 'Hide Filter', 'Clear Filter', and 'Edit in List' buttons. The search form includes several sections: 'Assignment Status' with dropdowns for 'Assignee', 'Group', and 'Status'; 'Priority' with 'Active' and 'Category' dropdowns; 'Template' with 'Created By' and 'Template Active' dropdowns; 'SLA Violation' with 'Earliest Time To Violation' and 'Latest Time To Violation' dropdowns; 'Order Summary' with 'Justification' and 'Effort' text boxes; 'Order Description' with 'Backout Plan' text box; 'Parent Change' with 'Root Cause' and 'Service Type' dropdowns; and 'Legacy Service Type' with a dropdown menu. A green filter icon and a 'Less...' link are also present on the right side of the form.

## Reports

From the Change Order Detail form and Change Search form, you are able to select either a detail or summary report by selecting Summary or Detail from the Reports menu. In the case of the Change Order Search form, information on all displayed changes would be provided in the reports.

# Chapter 7: Configuration Management

To support the Configuration Management processes of ITIL, Unicenter Service Desk was modified to use ITIL specific terminology and processes. This chapter provides a brief overview of the functionality provided in Unicenter Service Desk, r11.

## Main Page

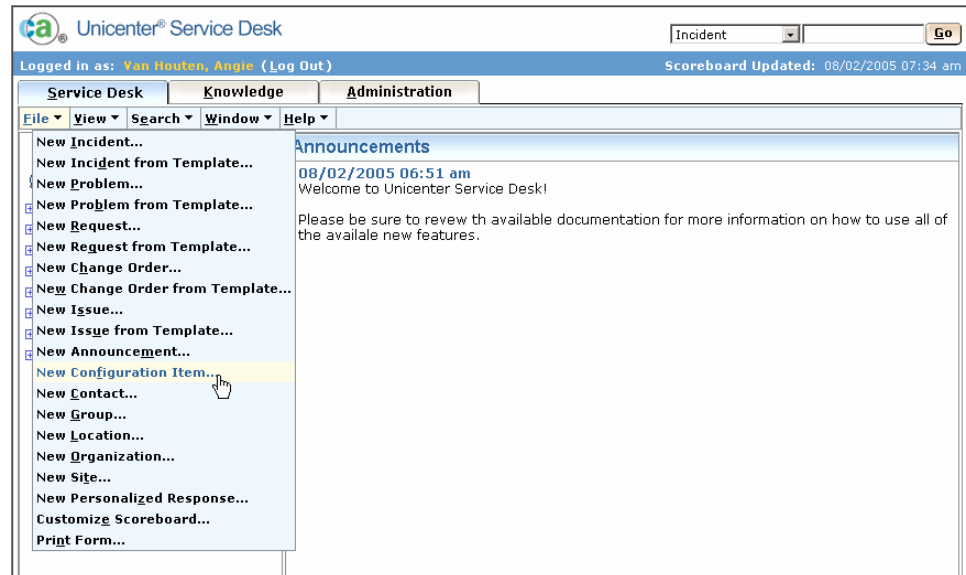
Once logged in to the web interface of Unicenter Service Desk, the following form appears:

The screenshot displays the Unicenter Service Desk web interface. At the top, the header includes the Unicenter logo and the text "Unicenter® Service Desk". To the right of the header is a search bar with a dropdown menu set to "Incident" and a "Go" button. Below the header, a status bar indicates the user is logged in as "Van Houten, Angie" with a "(Log Out)" link, and a "Scoreboard Updated: 08/02/2005 07:34 am" timestamp. The main content area is divided into three tabs: "Service Desk", "Knowledge", and "Administration". The "Service Desk" tab is active, showing a menu with "File", "View", "Search", "Window", and "Help". Below the menu is a "Update Counts" button. The "Scoreboard" section lists several items: "My Queue", "Incidents", "Problems", "Requests", "Change Orders", "Configuration Items", "Issues", and "Knowledge Documents". The "Announcements" section displays a message dated "08/02/2005 06:51 am" with the text "Welcome to Unicenter Service Desk!" and a note about reviewing documentation for new features.

From this point, you are able to view all available announcements.

## Work with Configuration Items

To create a new Configuration item, select the File menu and choose New Configuration Item, as shown by the following example:



The next example shows the "Server A" Configuration Item Detail form. On this form, the key elements that are specific to the ITIL configuration are the Incidents and Problems tabs, as well as additional fields on the Log tab.

The screenshot displays the 'Server A Configuration Item Detail' form. At the top, it shows the user 'Van Houten, Angie' logged in. The form includes a header with 'Server A Configuration Item Detail' and buttons for 'Edit' and 'Asset Viewer'. Below the header, there are several tabs: '4. Location', '5. Contacts', '6. Organizations', '7. Service Contracts', '8. Related CI's', '9. Incidents', '10. Problems', '11. Requests', '12. Change Orders', '13. Issues', and '14. Impact Analyzer'. The 'Log' tab is currently selected, showing a table with columns: 'Posted By', 'Date', 'Log', 'Attribute', 'New Value', and 'Old Value'. The table contains one entry with the date '08/02/2005 07:53 am' and the attribute 'location', with a 'Field Updated' status. There are also buttons for 'Add Log' and 'Search Logs'.

Posted By	Date	Log	Attribute	New Value	Old Value
	08/02/2005 07:53 am	Field Updated	location	Server Room	



## Configuration Item Search Page

To assist in locating Configuration Items, the Scoreboard and the Configuration Items Search form are very useful tools. The Scoreboard is provided with the following default nodes that should be useful in supporting the Configuration Management processes.

Following are the default nodes under "Configuration Items" > Active":

### **My High Priority**

This node displays all Configuration Items that are active, have a priority of 1, and the logged in user is the assigned "primary contact".

### **My Medium Priority**

This node displays all Configuration Items that are active, have a priority of 2 or 3, and the logged in user is the assigned "primary contact".

### **My Low Priority**

This node displays all Configuration Items that are active, have a priority of 4, 5, or None, and the logged in user is the assigned "primary contact".

### **Off Warranty**

This node displays all active Configuration Items that have a Warranty End Date that equals today or earlier.

### **Expired**

This node displays all active Configuration Items that have an Expiration Date that equals today or earlier.

### **Owned by my Org**

This node displays all active Configuration Items that have a Responsible Organization that is the same as the logged in user's organization.

### **Maintained by my Org**

This node displays all active Configuration Items that have a Maintenance Organization that is the same as the logged in user's organization.

Following are the default nodes under "Configuration Items" > "Inactive":

### **My High Priority**

This node displays all Configuration Items that are inactive, have a priority of 1, and the logged in user is the assigned "primary contact".

### **My Medium Priority**

This node displays all Configuration Items that are inactive, have a priority of 2 or 3, and the logged in user is the assigned "primary contact".

### My Low Priority

This node displays all Configuration Items that are inactive, have a priority of 4, 5, or None, and the logged in user is the assigned "primary contact".

### Off Warranty

This node displays all inactive Configuration Items that have a Warranty End Date that equals today or earlier.

### Expired

This node displays all inactive Configuration Items that have an Expiration Date that equals today or earlier.

### Owned by my Org

This node displays all inactive Configuration Items that have a Responsible Organization that is the same as the logged in user's organization.

### Maintained by my Org

This node displays all inactive Configuration Items that have a Maintenance Organization that is the same as the logged in user's organization.

The following is an example of the Configuration Item Search form:

The screenshot shows the Unicenter Service Desk interface. The top navigation bar includes 'Service Desk', 'Knowledge', and 'Administration'. The user is logged in as 'Van Houten, Angie'. The 'Configuration Item Search' form is displayed, featuring a sidebar with 'Update Counts' and a list of items like 'My Queue', 'Incidents', 'Problems', etc. The main search area has a grid of fields for filtering, including Name, Host Name, Serial Number, MAC Address, Alt CI ID, DNS Name, IP Address, Location, Status, Service Type, Contact, Manufacturer, Model, Priority, Product Version, License Number, Financial Reference, Family, Supply Vendor, Responsible Vendor, Maintenance Vendor, Cost Center, Responsible Org, Maintenance Org, Earliest Acquire Date, Latest Acquire Date, Earliest Installation Date, and Latest Installation Date. Green filter icons and 'Less...' links are visible on the right side of the search grid.

The Configuration Item Search form is available by selecting Configuration Items under the Search menu of the menu bar. As you can see from the previous example, you are provided with many fields for performing a very granular search. This selection of available fields can be expanded by clicking on the green filter icons located on the right side of the Search form.

The following is an example of the Configuration Item List form that displays the results of a search. From this form, you can access detailed information by clicking a particular item:

The screenshot shows the Unicenter Service Desk interface. At the top, it says "Unicenter® Service Desk" and "Logged in as: Van Houten, Angie (Log Out)". There's a "Scoreboard Updated: 08/02/2005 07:34 am" status. The main menu includes "Service Desk", "Knowledge", and "Administration". Below this is a navigation bar with "File", "View", "Search", "Reports", "Window", and "Help". On the left, there's a "Scoreboard" section with links to "My Queue", "Incidents", "Problems", "Requests", "Change Orders", "Configuration Items", "Issues", and "Knowledge Documents". The main area is titled "Configuration Item List" and has buttons for "Search", "Show Filter", "Clear Filter", and "Discovered Assets". It shows a table with one configuration item found:

Name	Family	Class	Supply Vendor	Contact	#Req	#Inc	#Prb	#Chg	#Iss	Active
Server A	Hardware	Discovered Hardware			0	0	0	0	0	Active

At the bottom, it says "© 2005 Computer Associates International, Inc. All rights reserved."

## Reports

From the Configuration Item Detail form and Configuration Item Search form, you are able to select either a detail or summary report by selecting Summary or Detail under the Reports menu. In the case of the Configuration Item Search form, information on all displayed Configuration Items would be provided in the reports.



# Chapter 8: Service Level Management

---

Service Level Management is supported through the following features of Unicenter Service Desk:

- Service Types (including SLA Violation and Escalation functionality)
- Functionality associated with Incident Area and Problem Area
- Call Back Flag functionality
- Auto Assignment
- Scoreboard
- Reporting
- Automated Notification

These features are predominantly items that are configured by an administrator and as such, are all fully described in the *Unicenter Service Desk Administrator Guide*.



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